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Yearbook 2015

The Quality of the Media

Digest: main findings

Schweiz Suisse Svizzera

fög / Universität Zürich

Schwabe

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«Human rights cannot be taken lightly»

Foreword of the Board of Trustees

The primacy of enlightenment, clear-sightedness in recognising social developments, commitment to a fair society and strengthening of democracy form the starting point for the Stiftung Öffentlichkeit und Gesellschaft (Foundation for the Public Sphere and Society) which is responsible for financing the research and publication of the Yearbook on the Quality of the Media in Switzerland. On the painful death of our dear friend, mentor and guiding spirit of the *fög*, the Board of Trustees would like to remember Kurt Imhof with a quotation penned by him in December 2014, which is, so to speak, the guiding principle for the purpose of our foundation.

In thanks for the time spent together, we recall a great visionary and an upright human being, an important researcher and humanist; in sorrow at the loss and in hope for the work created. One of Kurt Imhof's many achievements was that he always encouraged young talent and set up his own succession at an early stage. The academic team around Kurt Imhof must now unexpectedly continue to work without him. The Board of Trustees looks to the future with confidence and is sure that the new management of the *fög* can respond to the challenges of the future in terms of quality, creativity and substance, building on these foundations.

In September 2015

Christine Egerszegi-Obrist (Member of the Council of States), Mark Eisenegger (Chair of the Board of Trustees, Professor for Organisational Communication at the University of Salzburg), Barbara Käch (CEO of the Solothurn Adult Education Centre), Yves Kugelmann (Publicist and Publisher), Fabio Lo Verso (Publicist and Publisher), Dick Marty (Politician and former Public Prosecutor), Oswald Sigg (Publicist and former Speaker of the Federal Council), Peter Studer (Publicist and Media Lawyer)

«My idealism alone already embodies everything: the will to do something meaningful, the expectation on me and those around me to imagine the world differently, to change it, the idea that you can actually change the world too if you just want it enough, and that this is an essential part of a good life. I constantly want to reach for the stars. All the more so as we live in curious times. We have to keep our eyes open, appalling things almost escape our consciousness of time. The walls of fortress Europe are being assailed by death upon death upon death and few people are really taking it in. The contrast with the horror about the boat people in the 1970s in the South China Sea could not be greater. Nothing to do with newsworthiness prompted by proximity, but a different spirit of the age which has taken control right across Europe: death off the coasts of Italy, Malta and Greece is now of less value than death back then in the South China Sea. […] You have to be careful about ‹tarring others with the fascist brush›, but one has to remember that so far, in Switzerland, the only groups negating asylum rights and human rights have been the right-wing extremist ‹Fronten› movements in the 1930s. Here too there is no public protest; it is accepted. Only a few are astonished about the conditions of this unprecedented radicalisation. […] However, here at *fög* we know about this, it is what we were trained for, we have the understanding and the historical overview. This means that we should not accept society as it is, instead we have to explain how it has become like this. Death upon death upon death of refugees and negating the right to asylum along with human rights cannot be taken lightly. [...] This is an attack on the civilising accomplishments of good life anchored in positive law. The fact that this is possible is fundamentally linked to the quality of public communication. It is the seismograph for the state of political culture in the spectrum between barbarism and civilisation. No war or civil war can be waged without communicative preparation of the barbaric in public communication. This is so much easier the more the media become institutions for satisfying needs. […] It also becomes so much easier as large parts of the population bid farewell to the remaining civilising power of public reasoning. The unfocused consumption of items with a promise of something sensational is mutating for large sections of two generations now into a pathological perception of the world that sees chaos outside Switzerland, in the midst of which Switzerland itself seems like an island whose continued existence is threatened by elites and foreigners. Here I have no other choice, here I have to fight, I have to change things, I have to open eyes, with the Yearbook and with my own being.»

Kurt Imhof †, from a letter in December 2014

There is a foreword by Mark Eisenegger about Kurt Imhof's life and work in the 2015 issue of the Yearbook «The Quality of the Media – Switzerland» and at www.foeg.uzh.ch.

Yearbook 2015: The Quality of the Media – Switzerland

What is the purpose of the Yearbook?

The purpose of the Yearbook is to deepen the debate about the quality of the media and to help improve it. It will be a resource for people working in the media, those involved in politics, business or academia and anyone with an interest in media trends and media contents. The Yearbook is based on the view that the quality of democracy depends on the quality of the information communicated to the public by the media. The Yearbook will provide the public with a benchmark for the kind of journalism they wish to be exposed to, the media makers will have a benchmark for the kind of journalism they want to produce and be responsible for, and politicians will gain an insight into how the media world is developing and into the resources available for information-based journalism in Switzerland.

Where can I find the Yearbook and the studies?

The Yearbook comprises the main findings and the repetitive part – the systematic annual monitoring of the Swiss media arena* in all information media* forms* (press, radio, television and online). The Yearbook is available both in printed form (ISBN 978-3-7965-3437-9) and as an e-book (ISBN 978-3-7965-3438-6) from Schwabe Publishers (www.schwabe-verlag.ch), coming out in both formats in the autumn. The in-depth studies are published as separate e-publications and are also available from Schwabe Publishers. About 2 or 3 of these kinds of studies are published each year. The *fög* publishes further research and communicates the main findings on www.foeg.uzh.ch on an ongoing basis.

Who is responsible for the Yearbook?

The Yearbook is produced and published by the *fög* – Research Institute for the Public Sphere and Society / University of Zurich (www.foeg.uzh.ch).
The following authors have contributed to the Yearbook 2015 (in alphabetical order): Christian Caspar, Urs Christen, Mark Eisenegger, Patrik Ettinger, Angelo Gisler, Lucie Hauser, Kurt Imhof †, Jörg Schneider, Mario Schranz, Linards Udris and Daniel Vogler.

Who provides funding and support for the Yearbook?

The Yearbook is financed by the non-profit «Stiftung Öffentlichkeit und Gesellschaft» (Foundation for the Public Sphere and Society – www.oeffentlichkeit.ch) and the University of Zurich.
The Board of Trustees comprises: Christine Egerszegi-Obrist, Mark Eisenegger, Barbara Käch, Yves Kugelmann, Fabio Lo Verso, Dick Marty, Oswald Sigg and Peter Studer. The foundation owes the funding for the project to the following donors: Adolf und Mary Mil Stiftung, Allreal Holding AG, Anne Frank Fonds, Credit Suisse Foundation, Die Schweizerische Post AG, Fidinam (fidinam.ch), Verband Interpharma, Paul Schiller Stiftung, Schweizerische Mobiliar Versicherungsgesellschaft AG, Stiftung für Qualitätsjournalismus Ostschweiz, Zürcher Kantonalbank and various individual donors.
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Digest: main findings[1]

The digitalisation* and globalisation of the media system and the progressing structural weakness of the Swiss information media – these are the essential processes which the sixth *Jahrbuch Qualität* der Medien: Schweiz – Suisse – Svizzera* describes and analyses. In order to tackle these phenomena, there is once again a systematic investigation of media usage, of the financial position of the information media, of the development of the ownership structures and media concentration*, of media policy debates and of how the quality of information-based journalism has developed.
The results of the 2015 edition of the Yearbook can be summarised as follows:

I. *Soft news is gaining significance as a result of digitalisation:* Usage of traditional information media in the press, radio and television forms further decline, whereas online media usage is gaining further momentum. In particular, mobile* information usage via tablets and smartphones and the importance of social media such as *Facebook* are increasing when it comes to news consumption. This above all involves use via social media* of episodic content and soft news from lower-quality information media. On the other hand, the consumption of higher-quality information-based journalism continues to shrink. As digitalisation progresses, information-based journalism is also losing more and more young users, because they primarily use entertainment offerings online. The «news-deprived» group, that is those (mainly young) users who consult little or no information media, is growing.

II. *Digitalisation of the media system is also weakening the information media financially:* Willingness to pay for online information media continues to be low, advertising revenue remains far below expectations, users' aversion to advertising on online platforms is strong and local media providers are coming under growing international competitive pressure. Advertising markets are increasingly becoming a domain of the global tech giants *Google* and *Facebook*. Recently, these tech giants have also been breaking into the journalism business, with the aim of completing the digital fingerprint of their users and thus of further optimising their opportunities for personalised advertising. This means that the commercial basis for information-based journalism is shrinking further.

III. *Upgrading of sectors outside journalism, greater concentration and less diversity*:* This structural weakness leads to Swiss media organisations striving for more and more synergies between their own outlets* in the range of information services they offer and combining existing outlets and programmes, to non-journalistic business lines (including online classifieds or marketing services) gaining in importance and to media organisations becoming more receptive to influence exerted by economic and political players. This weakens those editorial teams who produce independent and substantive information-based journalism.

IV. *Increased competitive awareness:* As a further consequence of the growing structural weakness of the information media and of increasing online convergence, the competitive awareness of private media providers is rising, with respect to the international tech giants, but also to *SRG SSR*. However, the sector is divided when it comes to the question of where the greatest competitive threat for traditional media companies is coming from both now and in the future. It is either stressed that the global tech giants are the true competitors and Switzerland's private and public media organisations should therefore cooperate, or on the other hand that private Swiss media organisations are above all in competition with *SRG SSR*, which means that there is a need to cooperate with the tech giants *Google* or *Facebook*. The question of which strategies will win the day remains open, because there has recently been an accumulation of several highly influential events. Firstly, in August 2015 *Ringier AG* and *Swisscom* announced a strategic partnership with *SRG SSR* in advertising marketing, in order to counter competition from the tech giants. As a result, new divisions in the media sector are breaking out and there is significant intensification of the conflict within the private media sector. Secondly, the argument is still characterised by very intensive public debate in connection with the vote on the RTVG [Radio and Television Act] in June 2015. Here, *SRG SSR* has been exposed to scandal-mongering, something quite new in terms of its vehemence. The erstwhile media policy consensus about culturally diverse and physically small Switzerland needing both a strong public broadcasting

1 The terms with an * refer to the glossary in the Yearbook which is also published on www.foeg.uzh.ch.

service* and strong private media providers is eroding, particularly in light of increasing online convergence as well.

V. *The structural weakness in information-based journalism has a measurably negative impact on media content.* Our time series give an overall picture of declining quality for many media outlets* examined since 2010. Provision of context* has suffered most, due to lack of resources in terms of finance, personnel and time in information-based journalism. Episodic news items are becoming more important and citizens are more and more often left to their own devices when it comes to interpreting complex political, social and economic relationships. The quality of information-based journalism is not only falling at most media outlets, but also throughout the media arena. Lower-quality outlets are attracting more users, whereas higher-quality outlets are losing them. In the process, it is generally evident that the «newer» offerings, that is free papers and online offerings, have a lower quality than the traditional information media. The recently launched outlet *watson.ch* has so far not raised the quality in the Swiss media arena either with its hybrid strategy (high-quality stories are cultivated in a similar way to lower-quality, attention-grabbing stories), but it has achieved a quality score* which is nevertheless average across all media outlets and is well-positioned, even above average, in comparison to other news sites*.

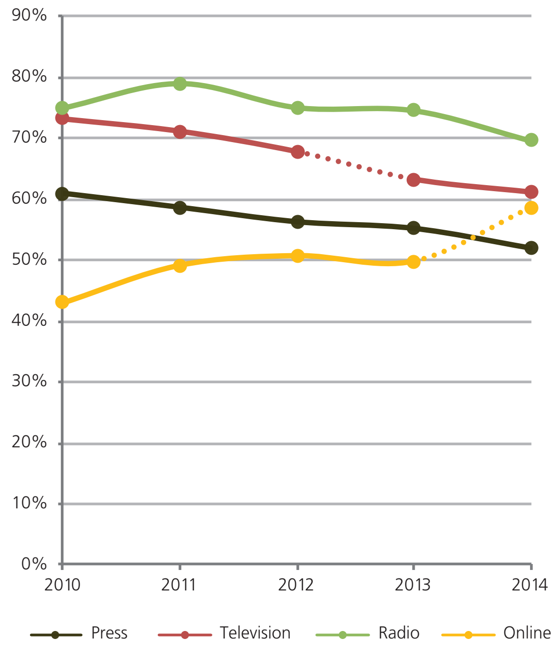


Diagram 1: Overall usage: information offerings of all forms

The diagram shows how the coverage of the population by the press, online, television and radio forms has developed across Switzerland between 2010 and 2014. All information outlets covering over 0.5% of the population in their linguistic region are taken into account. The change in the method of recording user numbers for the television (2012 to 2013) and online (2013 to 2014) forms means that the values for the respective years are not directly comparable with one another (sources: WEMF for distribution/circulation, weighted values; usage figures from NET-Metrix and Mediapulse).

Interpretation example: The press form's coverage rate fell by 3.2 percentage points to 52% between 2013 and 2014.

These processes of digitalisation, globalisation and structural weakness are clarified in the summary below and substantiated using empirical findings, figures and statistics.

I. Shift of the information media to the Internet and the increasing significance of soft news

Online has been reaching more and more news consumers in Switzerland since 2010, whereas the information offerings of the press, radio and television have been losing users (see diagram 1): over the last five years the reach* (measured as a cumulative coverage rate* of information outlets which reach at least 0.5% of the population aged 15 or over in the linguistic region) of the press fell by a full 9 percentage points. Television's information programmes are also losing users. This is shown by both the old results (–5.4 percentage points from 2010 to 2012) and the new ones (new method starting in 2013) from Mediapulse (–2.1 percentage points from 2013 to 2014). The coverage rates for information programmes on the radio have also fallen by 5 percentage points over the last five years.

In contrast to this, information media online indicate coverage rates which already rose by 7 percentage points from 2010 to 2013 (according to the old measuring method of NET-Metrix) and in 2014 again they were around 9 percentage points higher than in 2013 (according to the new measuring method). The growth

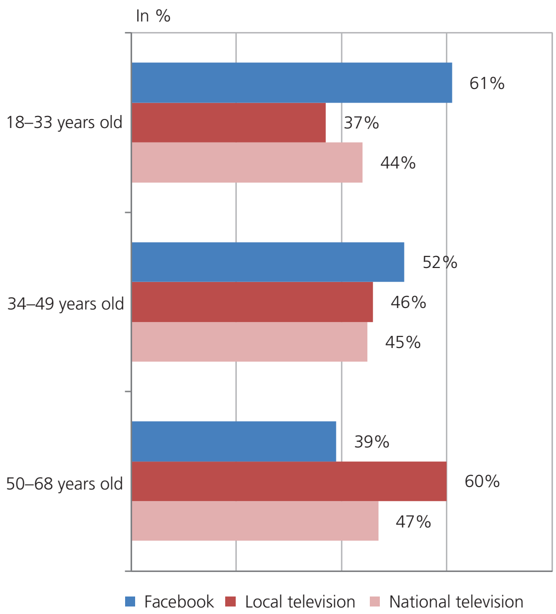


Diagram 2: Social media: news usage via *Facebook* in comparison to local and national television in the USA

The diagram shows the proportion as a percentage of those surveyed who consume news about politics via the channels of *Facebook* along with local and national television. The data is based on an online survey in the USA. The *Facebook* and local television formats were directly sampled. The news offering most often mentioned in each case was taken into account for the national television format (source: PEW 2015).

Interpretation example: 61% of those surveyed between the ages of 18 and 33 stated that they had consumed news on the subject of politics in the week prior to the survey via *Facebook*.

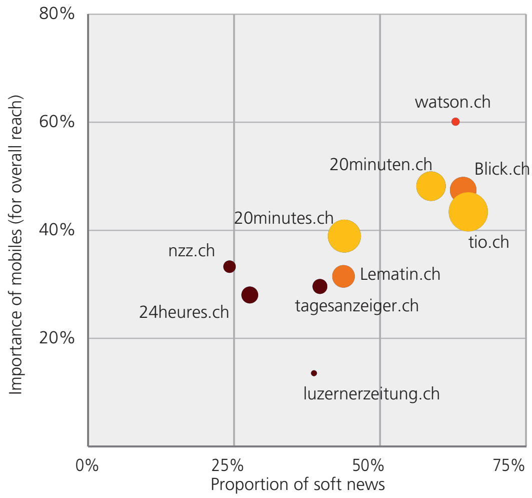


Diagram 3: Positioning of news sites according to mobile usage and proportion of soft news

The diagram shows the individual web offerings according to the level of mobile usage and the proportion of soft news on the respective news site (source: NET-Metrix usage figures, fög – data for information offering analysis*).

Interpretation example: With their large reach, the free press news sites in particular have a high proportion of mobile usage and a lot of soft news.

in usage of online information media has been accentuated in the latest investigation period because mobile media usage has gained considerably in importance all over the world. International studies show that tablets and smartphones are increasingly ousting the printed daily newspaper as the main source of information or as a provider of news (Reuters, 2015). Some information offerings are already experiencing very strong mobile usage in Switzerland as well. The leader here is the *watson.ch* news site, if we look at the proportion of mobile usage in comparison to the whole reach. For *watson.ch* this proportion is 60% (see NET-Metrix, 2015). However, digitalisation of media usage is also increasing the importance of social networks for news consumption. A survey from the USA for example shows that 61% of media users between 18 and 33 years old already predominantly consume news via *Facebook* (Pew Research Center, 2015). The social media platform is also the main source of news for users between the ages of 34 and 49, whereas people between 50 and 68 years of age still prefer local television for this purpose. *Facebook* therefore continues to strengthen its position as the main news channel of the younger generation (see diagram 2). Press outlets which are also used online were not in the top 10 of the most-used information offerings for any age group.

For Switzerland, figures from SimilarWeb show above all that the recently launched news sites of *blickamabend.ch* and *watson.ch* are heavily focused on social media and generate a quarter of their users (24% for *blickamabend.ch*) or already over a third of them (38% for *watson.ch*) via this channel. These findings give reason to expect that the trend will continue to go in the direction of greater digital media usage via mobile devices and social media and that information-based journalism will undergo a lasting change as a result.

This trend increases the importance of lower-quality soft news in the media arena: Those media which have a greater orientation than others towards soft news (human interest and sport) are precisely the ones benefiting from increasing mobile usage. This is clear if we

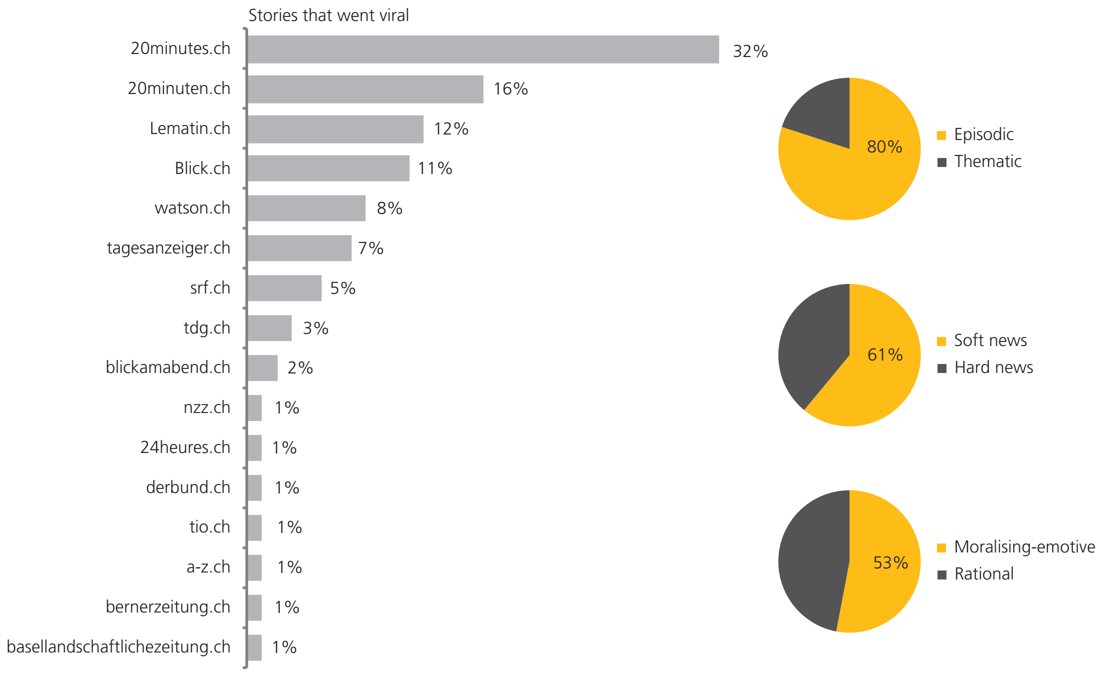


Diagram 4: Virality*

The diagram on the left shows the frequency with which specific media outlets along with their stories were disseminated via social media. The three pie charts on the right indicate the proportions in which these stories focus on individual events (episodic), use soft news as their subject matter or have moralising-emotive* overtones. The data is based on the 200 stories from 2014 which most frequently went viral (source: Themenpuls.ch).
Interpretation example: 20minutes.ch accounted for 32% of the 200 stories that most frequently went viral. Overall, 53% of all the stories investigated are characterised by a moralising-emotive reporting style*.

combine the media usage data (NET-Metrix) with the content analyses of the *fög* on media coverage in 2014: the higher the proportion of mobile users for a media offering, the higher the corresponding proportion of soft news is as well. Less demanding content is obviously preferred when on the move and on the small screens of mobile devices. However, media with a soft news orientation do not just enjoy greater mobile usage, media with high proportions of mobile usage also have a greater orientation to viral effects on social networks, and users access these news sites more frequently via social media. The offering from *watson.ch* is an example of this new form of «social media journalism» which is capable of generating a high level of reach on social networks with soft news: usage via mobile devices of the *watson.ch* news site launched in 2014 has already reached 60% (NET-Metrix), and *watson.ch* – as indicated above – already has 38% access via social media, above all via *Facebook* (source: SimilarWeb). At the same time, with more than 60% soft news, *watson.ch* is one of the media outlets with the highest proportion of soft news (see diagram 3).
Social media, which are fast gaining in importance when it comes to using and distributing media content, are increasing soft news content in the media arena and therefore lowering the level of quality. Web statistics from *Themenpuls.ch* and the content analyses of the *fög* published in this Yearbook for Switzerland show that above all stories with lower-quality content are linked on the social networks: stories which focus on soft news content, are event-driven and have moralising-emotive overtones go viral considerably more frequently than stories with hard news content*, analyses providing context and stories based on sound factual arguments. Of the 200 stories which were most linked, liked or tweeted, or commented on on news sites or on *Facebook* in 2014, 61% were soft news stories. 80% of the stories were also episodic, that is without any provision of context, and 53% had moralising-emotive overtones (see diagram 4).

In line with this finding, the media story attracting the most viral attention in 2014 involved an elderly dying woman in England who was able to fulfil her last wish by once more seeing the horse she had looked after for years (*20minutes.ch*, 10 Nov. 2014). So, the more the orientation of media organisations moves towards the viral success of their reporting, the more lower-quality, entertaining information offerings (soft news, moralising-emotive stories, selective reporting) gain in importance.

The consumption of higher-quality information-based journalism is getting smaller: Higher-quality information-based journalism is losing its consumers as digitalisation progresses. Usage data, which we have collected along with our research partner GfK using online surveys, support this finding. For example, the proportion of people who regularly use subscription papers (at least four days a week) has fallen by 14 percentage points from 56% to 42% in just six years (see diagram 5). The usage of lower-quality free papers has also declined slightly at a high level. Information programmes in television and radio forms are also particularly affected by falling usage. Because those surveyed belong to an «online population» who have a greater affinity for digital media usage, the losses presumably tend to be somewhat too high in terms of the overall population. Conversely, the proportion of regular online users has increased by 6 percentage points from 51% to 57%. There is therefore still clearly a low level of saturation among Internet-savvy users too when it comes to digital media usage. The survey data thus also support the long-term rise in terms of coverage through digital information offerings, as also shown by the NET-Metrix usage data for example.

The process of digitalisation of media usage, that is the progressive shift in information usage to the Internet, is accompanied by a dynamic of obsolescence of the traditional media types* of subscription papers and the public broadcasting service. According to the usage data provided by Mediapulse, the proportion of people aged over 60 who watch the «Tagesschau» [TV news] is for instance 66%. Moreover, these older people are also increasingly turning away from information programmes provided by the public broadcasting service. For example, the *Echo der Zeit* programme lost around 20% of live listeners within six years in this age group (the method also records live streaming on the computer). According to our estimates, losses of this kind cannot be offset by the demand for broadcasting service providers' online offerings being greater than before. The available data are not precise enough for exact statements, but it is clear that a significant proportion of users, for instance on *srf.ch*, do not really head there for *Echo der Zeit* (or another information programme), but consume entertainment series or the weather forecast.

It is also clear from the GfK survey data that there are few young people among the consumers of information-based journalism: information-based journalism has a problem in terms of young people. Thus, from 2009 to 2015 there has been a significant fall in the proportion of young adults who regularly get their information via (printed) subscription papers (from 44% to 26%), television (from 65% to 39%) and radio (from 66% to 53%). In addition, the number of young adults who no longer get any of their information via these traditional media has risen significantly: for sub-

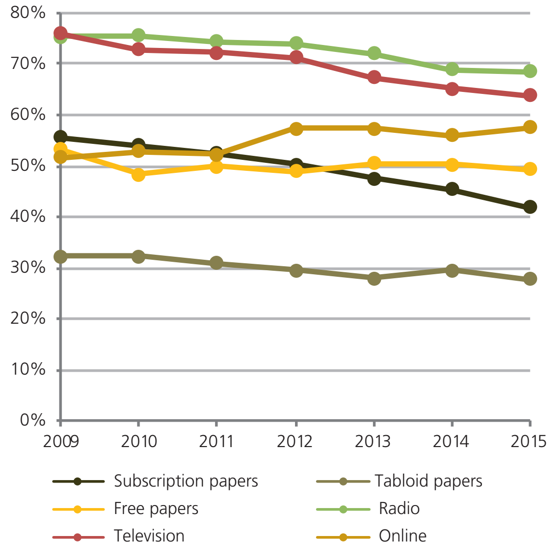


Diagram 5: Regular news usage – press types in a comparison of forms

The diagram shows how regular news usage in the press (subscription, tabloid and free papers) has developed in comparison to the online, radio and television forms. Regular usage means that an outlet, a programme or a news site is «often» or «very often» used, that is in at least four consecutive editions (source: GfK Business Reflector).

Interpretation example: Between 2009 and 2015, regular news usage via subscription papers fell from around 56% to 42% among those surveyed.

scription papers from 35% to 56%, for television from 4% to 11% and for radio from 8% to 13%.

While usage of the information media's online offerings has risen overall, this does not seem able to compensate for the decline in information usage for the press, radio and television forms. This particularly applies to the group of young adults, where even online usage of information media is not continuing to increase. Instead, young people increasingly only get their information now through alternative channels, above all via social media, or some of them are lost entirely as information users, because they primarily use entertainment offerings. In the process, social media channels present soft news to young adults to a far greater extent than conventional media, because this goes viral by far the most frequently. It is an alarming development in terms of political democracy that the «news-deprived» group, who makes little or no use of information offerings any more, but instead mainly consumes entertainment, is growing above all among young adults.

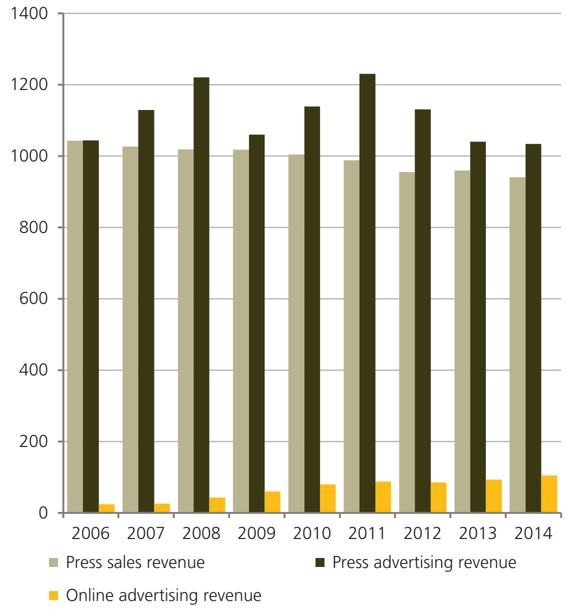


Diagram 6: Press and online financing

The diagram shows how sales and gross advertising revenue has developed (2006–2014) for the press form, along with gross advertising revenue for the online form in millions of francs. There is no information available about sales revenue for the online sector (source: Medienbudget Schweiz; Media Focus).

Interpretation example: Press advertising revenue in 2014 was 1,042 million francs, whereas online advertising revenue accounted for 105 million francs.

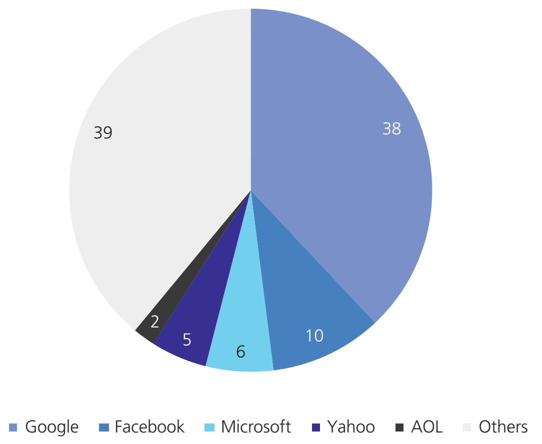
II. Decline in revenue for established media organisations as a result of digitalisation

The process of digitalisation is accompanied by a decline in revenue for providers of information-based journalism. The revenue from the online advertising and online readership markets cannot compensate for losses in the press sector (see also Meister/Mandl, 2014).

In spite of the shift of the news business to the Internet, the 2014 revenue from the online advertising market in Switzerland (105 million francs) only corresponds to one tenth of the revenue from the advertising business of the press (1,042 million francs). In spite of continually high growth rates since 2006, the online sector has got nowhere near achieving the advertising volume of the print business. Furthermore, the revenue growth of 12 million francs (+12.9%) in 2014 cannot offset the losses of 27 million francs (–2.6%) in the press market (Media Focus gross revenue) – interestingly, this is in a year when the press has had a rather smaller loss in terms of advertising revenue in comparison to the previous three investigation periods. Although media company strategies are concentrating heavily on the online segment, only a fraction of the revenue generated by the press sector is earned in this segment – at least with reference to information-based journalism (see diagram 6).

The decline in revenue above all affects higher-quality information offerings, because subscription papers suffer the greatest losses in terms of the whole (shrinking) advertising pie for information-based journalism, whereas free papers are the biggest winners in the longer term context. Because free papers have increased their share of advertising revenue from 4% in 2001 to 31% in 2014; for subscription papers the share has fallen from 67% to 46% (Media Focus gross advertising revenue using the example of German-speaking Switzerland).

It is above all increasing competition from global players like *Facebook* and *Google* which prevents higher revenue for information-based journalism providers in the online advertising market. A current study carried out in the USA provides striking findings: 61% of online advertising revenue in the USA is accounted for by



Source: PEW Research Center

Diagram 7: Online advertising revenue in the USA

The diagram shows the market share of the 5 largest players in terms of online advertising revenue in the USA in 2014.

Interpretation example: Facebook's market share was 10% in 2014.

the five largest providers, all of which are tech giants from outside the sector and not traditional news providers (*Google:* 38%, *Facebook:* 10%, *Microsoft:* 6%, *Yahoo:* 5%, *AOL:* 2%) (see diagram 7). There are no precise figures for this with regard to individual providers in Switzerland. However, with overall market shares of one third and a volume that has risen almost six-fold since 2007, search engines – mainly *Google* – have also become very important in Switzerland's online advertising market (source: Media Focus).

Furthermore, online advertising also has a problem of acceptance. Users of both sexes feel annoyed by clearly recognisable online advertising such as pop-ups or advertising videos. On a scale from 0 («is not annoying at all») to 10 («is extremely annoying»), advertising in the printed press is felt to be considerably less annoying (value of 4.1) than in the online sector, where animated banners and pop-up videos are perceived to be extremely annoying (value of 7 or 8.3) (Publicitas, 2014). This aversion to advertising was confirmed recently by a highly regarded international study by PageFair and Adobe about the use of ad blockers (around 15% of the Swiss use ad blockers). This aversion to online advertising further exacerbates the revenue situation in information-based journalism and ensures that acceptance of alternative, allegedly more subtle, forms of advertising, such as native advertising or sponsored content, is growing in the media sector. In these new forms of advertising, there is an attempt to minimise the aversion of users to online advertising, by subject matters (advertising and PR) being offered in the guise of editorial content. However, this means that professional standards of journalism suffer, especially in terms of editorial independence or transparency.

The readership market does not contribute to solving information-based journalism's financing problem either. In the international context there are actually also a few optimistic voices in academia who point to the growing importance of revenue through digital subscriptions (Picard, 2014). However, the empirical studies comparing countries which are available so far do not expect subscription revenue in the online sector to develop into a substantial source of income for the time being. Substantial revenue cannot be expected from the digital readership market in Switzerland either, because willingness to pay for online news remains persistently low. This means that more than half of Swiss media consumers are not prepared to pay for digital news offerings (WEMF, 2014). A major comparative study by Reuters Institute in 10 countries (no data were collected for Switzerland) also proves how reluctant media users are to pay for content in the online sector. Only 6–14% of those surveyed state that they have actually paid for online content (news) in 2014/15. The picture is even more gloomy when it comes to the proportion of those surveyed who would never pay for online content – irrespective of the price. In Great Britain, this proportion is high at 75% and in the USA it is 67%. The free culture in relation to news sites is therefore still very strongly fixed in the minds of news consumers. This is also linked to the fact that the proportion of news sites that have to be paid for is indeed growing, but that, in the vast majority of cases, this involves porous paywalls* which continue to offer users substantial quantities of stories free of charge and whose paywall systems are technically relatively easy to bypass.

Overall, willingness to pay for online information media remains persistently low, advertising revenue remains far below expectations, users' aversion to advertising on online platforms is strong and local media providers are coming under increased international competitive pressure from international tech giants *(Google, Facebook, Apple)*. Recently, these tech giants have also been breaking into the journalism business with the aim of completing the digital fingerprint of their users and thus of further optimising their opportunities for personalised advertising. A consequence of these processes is further erosion of the commercial basis for information-based journalism.

III. Upgrading of sectors outside journalism, greater concentration and less diversity*

Editorial cooperations are gaining in importance, media concentration is growing: A first consequence of the structural weakness described is that Swiss media organisations are searching for more and more synergies and want to create market advantages with outlets that have an extensive reach. A first aspect of this aspiration is growing media concentration due to takeovers. In 2001, around 40% of the press market in German-speaking Switzerland was still covered by publishing houses which no longer exist today; in French-speaking Switzerland, those publishing houses which have since disappeared even covered over 80% of the information market in 2001 (see diagrams 8 and 9). The importance of the few remaining private media organisations has been constantly rising since then: in 2014, *Tamedia AG* and *Ringier AG* together controlled around 60% of the press market in German-speaking Switzerland (offerings with a minimum coverage of 0.5% of the linguistic region's population), and in French-speaking Switzerland the two providers achieved as much as almost 80% of market share.

A second aspect of media organisations' aspirations for synergies is the merger of formerly independent media outlets into systems where local editions share content with the national edition. Thus, the number of (independent) journalistic units had already declined from 45 to 31 between 2000 and 2010 (Kradolfer/Custer/Künzler, 2010, p. 159) and the trend has been continuing more recently. *Der Landbote* in Winterthur, which has been 100% owned by *Tamedia AG* since 2014, now shares parts of domestic and foreign reporting with *Berner Zeitung* and the regional papers for the Zurich area. The highest quality paper in western Switzerland, *Le Temps*, which has been wholly owned by *Ringier AG* since 2014, has had to give up most of its traditional site in Geneva; in 2015, the staff is integrated into the

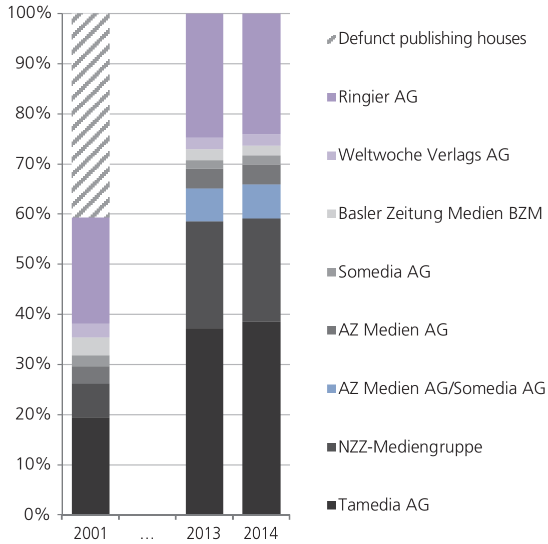


Diagram 8: German-speaking Switzerland – concentration within the press market

The diagram shows how the process of concentration has developed within the press market in German-speaking Switzerland for the years 2001 (reference year), 2013 and 2014. The cumulative circulation figures for each year for all the leading press outlets in German-speaking Switzerland constitute the whole market, while the respective share of the controlling parties* determines their market position. All press outlets covering at least 0.5% of the population in the linguistic region are taken into account (source: WEMF for distribution/circulation, weighted values). *Interpretation example: Tamedia AG* has been continually increasing its market share in German-speaking Switzerland and achieved a value of 38.5% in 2014.

newsroom* of the weekly magazine *L'Hebdo* in Lausanne.

The latest cross-media strategies of *AZ Medien AG* are also moving in the direction of achieving large reaches with an «integrated» offering, not only in a small regional area, but in larger parts of German-speaking Switzerland. This is shown by the increased collaboration of *AZ Medien AG*'s broadcasters in the television sector. *Tele M1* and *Tele Bärn*, which hold a concession, and *Tele Züri*, which does not, are broadcasting several programmes together and are also supplying the broadcaster *TV24* in German-speaking Switzerland, which was newly founded in 2014, with news material. Similar tendencies are evident in the radio sector where the programmes of *Radio Argovia* and *Radio 24* are being partially amalgamated. In this way, the process of

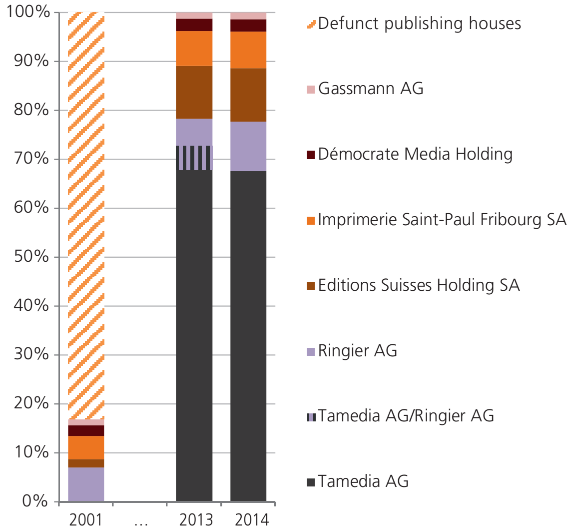


Diagram 9: French-speaking Switzerland – concentration within the press market

The diagram shows how the process of concentration has developed within the press market in French-speaking Switzerland for the years 2001 (reference year), 2013 and 2014. The cumulative circulation figures for each year for all the leading press outlets in French-speaking Switzerland constitute the whole market, while the respective share of the controlling parties determines their market position. All press outlets covering at least 0.5% of the population in the linguistic region are taken into account (source: WEMF for distribution/circulation, weighted values).

Interpretation example: Tamedia AG achieved a market share of 67.5% of the press market in French-speaking Switzerland in 2014.

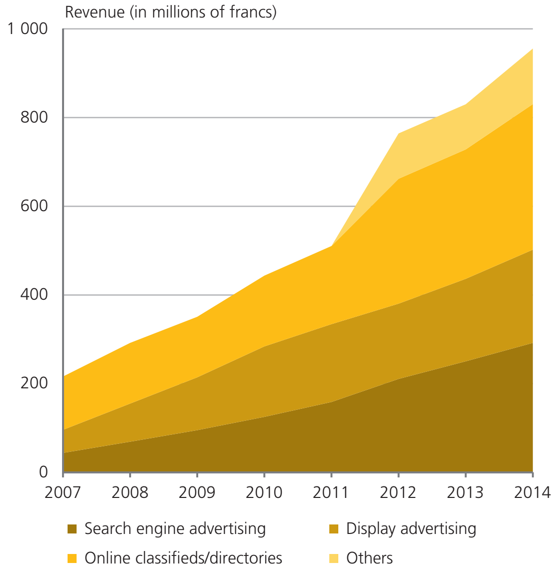


Diagram 10: Development of the online advertising market in Switzerland

The diagram shows the development of advertising volumes for various advertising formats in the Swiss online market for the years from 2007 to 2014 (diagram according to: Media Focus, 2015: Online advertising market, half-yearly report 2014/02).

Interpretation example: Search engine advertising, with an advertising volume of around 292 million francs in 2014, constitutes the strongest advertising format in the online market.

concentration is continuing in the Swiss media system. *Investment in fields which have little to do with the core journalism business:* A second consequence of the structural weakness of information-based journalism is shown by the fact that media organisations are increasingly investing in sectors outside journalism. Specifically, the two largest private media organisations in Switzerland, *Tamedia AG* and *Ringier AG*, increasingly generate their revenue via business with digital platforms or event marketing. In addition, the majority of the classified ad business, which traditionally has strong revenues, has shifted to the online sector. *Tamedia AG*, which bought the major *Ricardo* platform in 2015, wants to increase the proportion of profits from the digital division to more than 50% in the near future. As can be seen in diagram 10, it is not only search engine advertising, from which private media organisations hardly benefit in contrast to the tech giants, that is growing in the online advertising market, but also the sector of online classified ads and online directories. In addition, substantial amounts of revenue can be generated via digital platforms and online classifieds with fees for ads or, as with *Ricardo*, via shares in sales revenue. These services are therefore lucrative investment opportunities for the media publishing houses, which are under pressure. However, the online classifieds sector is highly concentrated; only the really large media groups, such as *Tamedia AG* or *Ringier AG*, are in any position to be able to afford the high costs of buying digital platforms of this kind. Moreover, these digital platforms are positioned as profit centres and cross financing of information-based journalism is to some extent ruled out. Activities beyond the core journalism business continue to gain in importance in the context of digitalisation. On the other hand, the journalism business that remains is shrinking. The major decline in the scope of many subscription papers over recent years is one of the indicators of this trend. In parallel to this, the editorial structures of information-based journalism are suffering a veritable bloodletting. The number of staff employed in editorial teams is falling both nationally and internationally (see Pew Research Center, 2014). With *Tamedia AG*, the focusing on online classifieds described above, the use of synergies through cooperation with European newspaper partners (LENA project) or the investments in low-quality free papers abroad (Luxembourg and Denmark) are striking. Among the largest media companies in Switzerland, it is primarily *NZZ-Mediengruppe* and *AZ Medien AG* which are still concentrating their investment in information-based journalism.

Increasing political pressure, increasing political influence: Another consequence of the structural weakness is evident in the fact that media organisations are becoming more receptive to political influences in the context of the general growth of PR pressure. Insofar as information media are getting into financial difficulties, the importance of investors and shareholders from outside the sector, and thus those pursuing political objectives through the media, is increasing. In the process, the largest takeovers of press outlets, (planned or discussed) replacements of chief editorial staff and ideological restructurings of newspapers over recent years have mainly been associated with the national conservative camp, which has powerful financiers. At *Basler Zeitung*, the SVP politician Christoph Blocher has held a third of the shares since 2014, and at *Weltwoche*, editor-in-chief and owner Roger Köppel announced that he was entering politics as a National Council candidate for the SVP in 2015. And at *NZZ*, following the dismissal of the editor-in-chief, it was only after major protests by the editorial team that he was not replaced in this position by the editor-in-chief of *Basler Zeitung*, Markus Somm, whose leading articles contribute to *Basler Zeitung* being politically positioned in the national conservative camp (Baumann, 2015). At a time of upheaval in Switzerland's media landscape and of a crisis in the press, senior representatives of the national conservative camp are managing to acquire individual press outlets, to reposition them and also to exert pressure on established media such as *NZZ*.

IV. Increasing online convergence is leading to more competition – *SRG SSR* is being portrayed as the main problem

Increasing digitalisation and the associated convergence of all media forms* on online platforms lead to the field of competitors both in the core journalism business and in the advertising market being extended at the national and global level. Players who previously operated in separate forms and sectors now clash with one another in the convergent online sector. This encourages conflicts between the media providers – also as a result of different regulatory approaches (press traditionally hardly regulated, broadcasting service traditionally heavily regulated). Two strategies of Swiss media organisations can be seen specifically in the context of intensified international competition. Firstly, some national media organisations are keen to strengthen their defences against the global tech giants and join forces in national alliances, as was recently the case between *SRG SSR*, *Swisscom* and *Ringier AG* (1). Secondly, other private media companies are showing greater readiness for cooperation with the global tech giants, while at the same time striving to restrain *SRG SSR* as a competitor (2).

Above all, it is striking that *SRG SSR* is being exposed to growing criticism due to increased competitive awareness (3). In the process, *SRG SSR* is being portrayed by private media organisations as the main problem in terms of the structural crisis within the media and is also coming under political pressure. The erstwhile consensus that culturally diverse Switzerland needs both a strong public broadcasting service and strong private media providers is increasingly being eroded.

(1) A response to the structural crisis and intensified competition – launching national defence measures: SRG SSR, together with private media organisations, is increasingly in competition with international tech companies and media providers (e.g. *Google, YouTube, Facebook, Apple* and *Netflix*). In the consumer market, private media organisations' news sites also come into competition with the (regulated) online offerings of *SRG SSR*. *SRG SSR* has been strongly affected by digitalisation and globalisation of the broadcasting market, because growing competition from cable network providers is a further issue for it. One reason why *SRG SSR* considers development opportunities in the online sec-

tor to be important is that *SRG SSR* is facing stronger and stronger competition in the traditional television advertising market. Because advertising slots of foreign entertainment broadcasters have now siphoned off 58% of the television advertising market (gross figures), whereas the advertising revenue of *SRG SSR* has no longer even been able to keep pace with inflation since 2002 (net figures). In general, there is a particular intensification of the battle for advertising revenue in the online sector, and in the process above all for the opportunity to collect user data and to be able to advertise in a target-group-specific or personalised way on this basis. This is currently the great advantage of global tech giants. The partnership announced in August 2015 between *SRG SSR*, *Swisscom* and *Ringier AG* is to be seen against the background of intensified global competition: they want to market advertising together in future and to defy the influence of *Google* and others on the basis of amalgamated user data.

(2) A further response to the structural crisis and intensified competition – greater readiness for cooperation with tech giants: Against the background of the structural weakness arising from digitalisation and globalisation of the media market, other private media organisations have recently been opening up to cooperations with the tech giants which have until now been competing for the largest share of advertising money (*Google* and *Facebook*). The most outstanding example of these kinds of approaches to cooperation by tech giants is the Instant Articles project of *Facebook*. Media such as the *New York Times* and *The Guardian*, but also *Spiegel Online* and *Bild*, are participating in the project. Whereas the social media channels have so far simply represented a good opportunity for information media to attract a large number of online users to their own news site, the effects of the new initiatives are much more radical. In the hope of generating high levels of reach via *Facebook*, the media companies offer their articles free of charge and without a link to their own news site. In turn, media providers are allowed to place their own ads around their articles and get demographic data about the users of the offerings they provide. It can be assumed from this that *Facebook* is less interested in journalism itself, but instead far keener on developing long-term user loyalty to its platforms. Users' digital fingerprints are thus completed and wastage associated with the scattergun approach with respect to the advertising industry can be further reduced.

For the established media publishing houses, journalistic and advertising association with the tech giants outside the sector is linked to considerable risks in terms of reputation and a loss of control. The editorial teams can no longer decide what context their articles will be placed in. In the social networks, high-quality news stories may end up next to low-grade stories which come from a doubtful source. This means that media brand credibility suffers. In addition, the news universe in social media (such as with *Facebook* Instant Articles) is no longer subject to the selection decisions of a media organisation. As a result, the control of traditional media providers over their journalistic content is diminishing and the tendency – if this development continues – is for them to be downgraded to the rank of suppliers of news, whereas distribution sovereignty over media content is increasingly transferring to the tech giants.

However, these connections are also problematic from a political democracy perspective, because cooperations of this kind lead to a further «unbundling» of journalism and a narrowing of news consumption in terms of themes. News consumption is becoming more transient and more segmented, because the only things that get read are what your «friends» post or what the algorithms of the social networks or search engines define as attention-grabbing. This means that the social integration function* of media communication in the public sphere suffers.

(3) New kind of fundamental criticism of SRG SSR*:* The structural crisis in the Swiss information media and the generally more intensive competitive awareness among media providers is promoting a new kind of fundamental criticism of the public broadcasting service. *SRG SSR* is in places being exposed to actual scandal-mongering by key political players, but also by private media organisations. In this context, *SRG SSR* is being portrayed in a problematic way as one of the main causes of the problems in information-based journalism. This means that the debate about the revision of the RTVG [Radio and Television Act] in June 2015 is dominated by those voices which exacerbate the conflict between the private media and the public broadcasting service and indulge in scandal-mongering with regard to *SRG SSR* in this key period of tran-

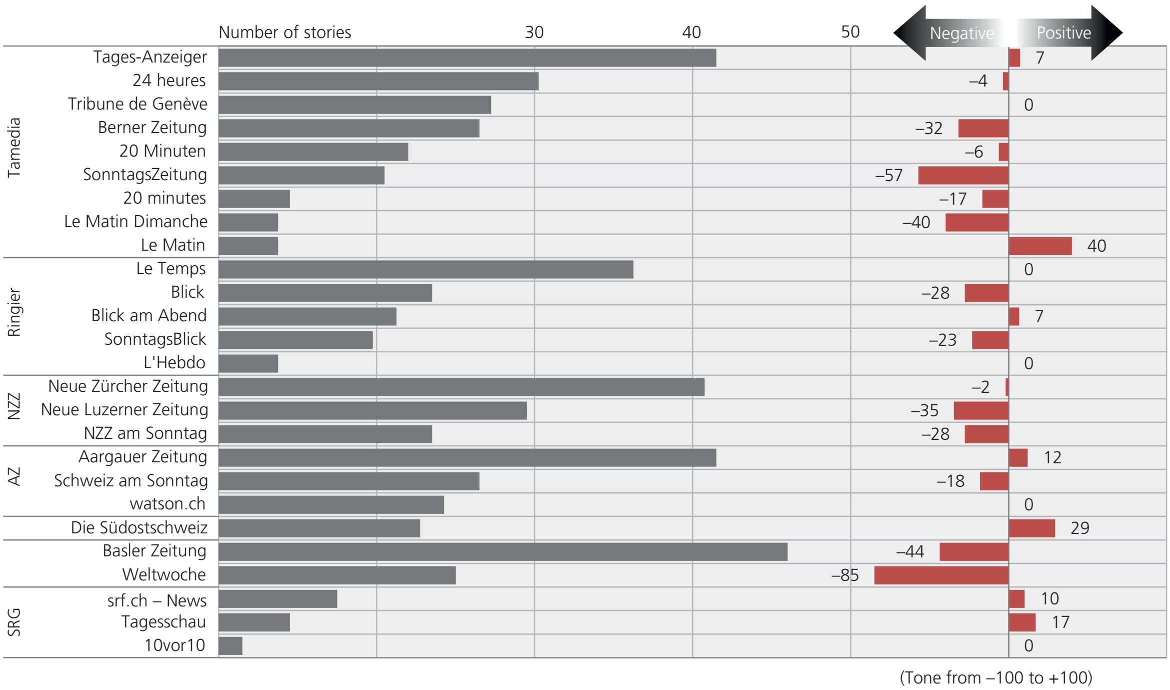


Diagram 11: Level of attention and tone – RTVG bill

The diagram shows the level of attention by media outlet (grey) and the tone of the stories (red) with regard to the RTVG bill and/or *SRG SSR*. The tone index can have a maximum value of +100 (only positive) to –100 (only negative) (n = 517 stories). All stories were recorded in the period from 1 March 2015 to 14 June 2015 (before the publication of the results of the vote), in which the RTVG bill or *SRG SSR* (in connection with the RTVG bill) were the key subject (for the methodology of the vote monitor, see fög 2015, p. 7).

Interpretation example: Berner Zeitung, which belongs to the *Tamedia AG* media organisation, published 22 stories about the RTVG bill or about *SRG SSR* (in connection with the RTVG bill) in the investigation period. The tone of these stories is negative overall at –32, that is to say in *Berner Zeitung* criticism of the bill and/or *SRG SSR* is prevalent.

sition. There is a clearly negative attitude prevalent in media reporting in most media outlets about the RTVG debate in terms of the RTVG bill and *SRG SSR* (see diagram 11).

It is striking here that media organisations such as *AZ Medien AG* and *Somedia AG*, which are set to get the most financial benefit from the new RTVG (for example through additional revenue from the fee pot for private regional television and radio broadcasters), are most inclined to be positive about the bill in their reporting. Otherwise, a clearly negative attitude is prevalent, not only with respect to the RTVG bill, but also to *SRG SSR*. It is striking that the focus is often on a general public service* debate, with the argument that *SRG SSR* is too strong a competitor for the private media and that the service mandate of *SRG SSR* should therefore be significantly restricted.

In this connection, media organisations assert their own interests when it comes to the RTVG and the future configuration of the public service and thus change from being a forum into being a party, but without making this transparent as a rule.

V. The structural weakness in information-based journalism has a measurably negative impact on media content

The structural weakness in information-based journalism is having a significant effect on the quality of reporting according to the measurements shown by the Yearbook. In seven of eleven media types investigated, the overall quality of the front page and lead stories* in 2014 is worse than just five years ago; in three of eleven media types, the overall quality in 2014 is indeed better than in 2010, but also worse in comparison to 2011, the

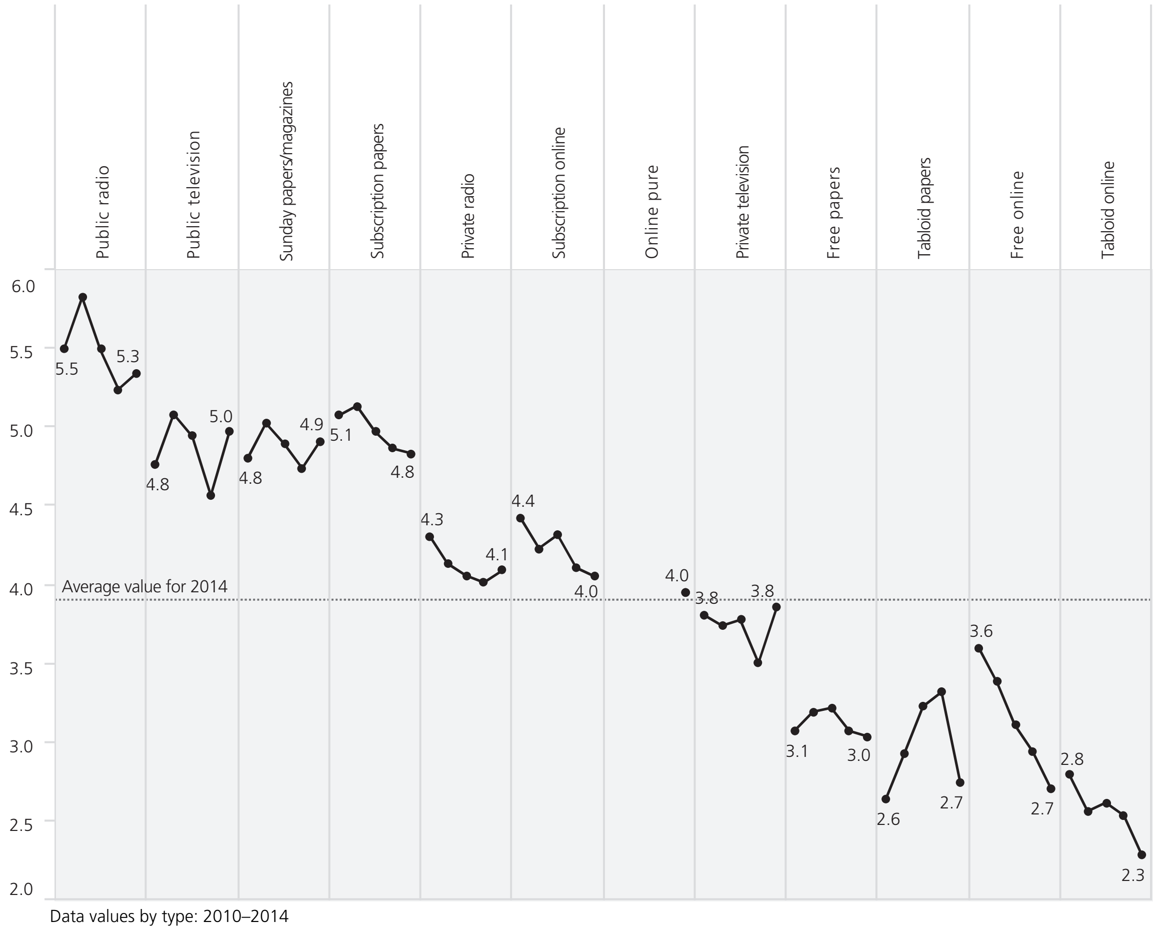


Diagram 12: Changes in quality of the 12 media types 2010–2014

The diagram shows the absolute quality scores for all media types from 2010 to 2014. The types are listed in descending order based on their quality score for 2014. The values shown have been rounded to one decimal point. Data set used: all stories from the analysis of front pages and lead stories* that were sourced on the basis of random samples over the years 2010 to 2014 (2010: n = 15,659; 2011: n = 17,092; 2012: n = 18,442; 2013: n = 17,040; 2014: n = 21,285).

Interpretation example: The free online type achieved the second lowest quality score in 2014. The score has gone down in comparison to the previous year and is now 2.7.

«hard news» year with the Arab Spring and the federal elections.

Only private television was able to achieve at least its 2010 level again in 2014 thanks to a rise in quality; a level which is however slightly below the average of 4.0 when comparing media types. At 4.0, the new online pure media type *(watson.ch)*, which was recorded for the first time, is nevertheless average for all media types and achieves a quality score which comes very close to that of the subscription online type (see diagram 12).

The largest reductions in quality between 2010 and 2014 were registered by the free and tabloid online types (–0.9 or –0.5 points), followed by the subscription press, both online and offline (–0.4 or –0.2 points). Revenue difficulties, austerity programmes, convergence aspirations and staff reductions in the editorial teams have a particularly negative effect on the provision of context, a key function of the information media. Provision of context has been declining in the Swiss media arena since 2010. This trend affects all the media forms and types (see diagram 13). It is also apparent that the public broadcasting service is still the

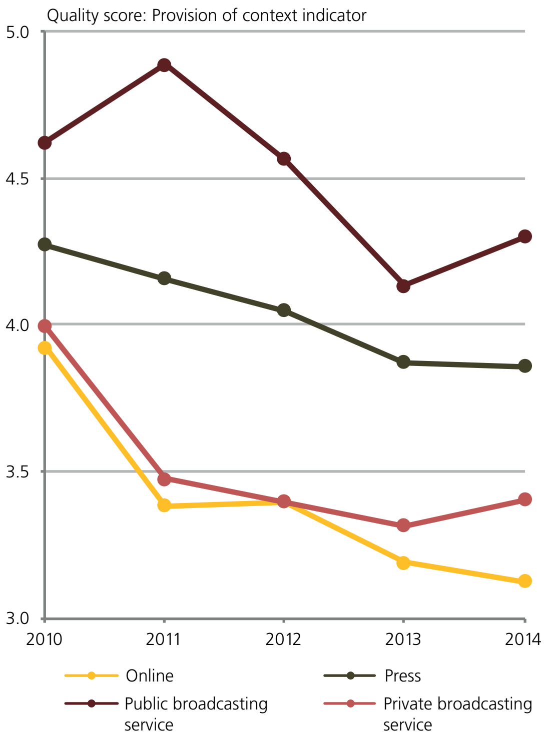


Diagram 13: Changes in quality 2010–2014: provision of context
The diagram shows the absolute quality scores in terms of the provision of context indicator for the press and online forms along with those for the public and private broadcasting services from 2010 to 2014. Data set used: all stories from the analysis of front pages and lead stories that were sourced on the basis of random samples over the years 2010 to 2014 (2010: n = 15,659; 2011: n = 17,092; 2012: n = 18,442; 2013: n = 17,040; 2014: n = 21,285).
Interpretation example: The online form achieved the lowest quality score with regard to provision of context in 2014 (3.1). The score fell by 0.8 points between 2010 and 2014.

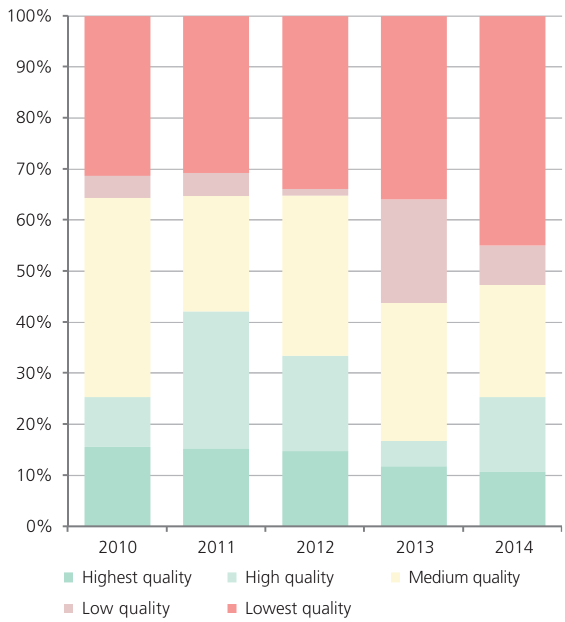


Diagram 14: Quality segments – proportions of cumulative coverage
The diagram shows how the coverage of the population by the press, online, television and radio forms in relation to the five quality segments has developed across Switzerland between 2010 and 2014. The values are shown as a proportion of the cumulative overall coverage. Data set used for quality classification: all stories from the analysis of front pages and lead stories that were sourced on the basis of random samples over the years 2010 to 2014. All information outlets covering over 0.5% of the population in their linguistic region are taken into account (source: WEMF for distribution/circulation, weighted values; usage figures from NET-Metrix and Mediapulse).
Interpretation example: Coverage of the Swiss population by the highest quality information offerings was 10.8% in 2014.

leader when it comes to provision of context and that provision of context suffers most in the rapidly accelerating online form.

The other three quality indicators give an ambivalent picture: whereas the rationality* of reporting has on average remained more or less stable over the years and the relevance of the players* has even risen slightly in a comparison over time (that is more focus on macro/meso sectors* such as the economic system or political institutions, less personalisation* and privatisation*), the proportion of hard news has fallen considerably since the «hard news» year of 2011. The news sites of the free outlets and the tabloid papers are above all responsible for the renewed increase in soft news, followed by online and offline subscription and the Sunday paper/magazine type.

If we take all four indicators together and look at the overall quality of the various media types over the last five years, we can note the following finding: with the structural crisis – including in the form of shrinking financial, personnel and time resources in information-based journalism and of the upgrading of non-journalistic business areas in media organisations – the quality of information-based journalism is also declining. Lower-quality media outlets and media types are attracting more users, whereas higher-quality outlets are losing them. In the process, it is usually evident that offerings seen as «newer» from a historical perspective, that is free papers and online offerings in general, come off worse than the traditional information media.

The growing importance of lower-quality information offerings in the media arena is most clearly shown if we compare the coverage of media from the various quality segments with one another (see diagram 14). The annual quality scores established for the individual outlets in this Yearbook form the basis of this comparison and the classification of the media outlets in these segments. The proportions of the media of medium (yellow), high (light green) and low (pink) quality are very volatile, because individual media outlets have also changed quality segments during the five-year period of the investigation. Coverage of the population with information offerings associated with the highest quality (dark green) has been in decline since 2010 and represented merely one tenth (10.8%) of the overall coverage in 2014 with 4 outlets. In comparison, the offerings associated with the lowest quality (red) have been constantly gaining users. Their share in 2014 represented almost half (44.9%), with a total of 24 outlets.

The expansion of the media sample has also contributed to this in the current investigation year. This is because the scores of the 10 newly recorded information offerings almost all end up in the lowest quality segment. New recording of outlets is however well-founded as the majority of these outlets involve online offerings which have been able to significantly increase their reach over recent years and play a larger role in the Swiss media system than before. Still, compared to that, growing mobile media usage, which leads to considerably higher coverage by online media, contributes even more to the findings decribed above. Because there are no online outlets in the highest quality segment, the higher usage of online information offerings via mobile devices on the contrary leads to increasing downwards stratification* of the media arena in terms of the quality of information provided.

In addition to the results given here, in this year's Yearbook and in the *Studien Qualität der Medien* (Quality of the Media Studies) which will be published by the end of 2015, there are further key analysis results, including the following themes:

Integrationsleistung der Schweizer Informationsmedien (Social integration capacity of the Swiss information media): The information media of the three major linguistic regions do indeed pay great attention to the same national (domestic political) themes, but they show hardly any interest in events in the other linguistic regions in each case. This means that the social integration capacity of the Swiss media suffers (see the «Media arena» section in the 2015 Yearbook).

Berichterstattungsunterschiede zwischen Online- und Print-Pendants (Reporting differences between online and print counterparts): The print and online issues of a paper do indeed share more and more articles. Nevertheless, there continues to be a clear distinction between the online and offline counterparts of the same media outlet. This means that users regularly encounter considerably worse quality on online home pages* than on the front page of the printed issue of the same media outlet (see the «Online» section in the 2015 Yearbook).

Wahlberichterstattung 2015 (Election reporting in 2015): The SVP has once again clearly dominated election reporting of the federal elections so far in 2015 (see the *study* «Eidgenössische Wahlen 2015» [«Federal elections in 2015»] along with the analyses on www.foeg.uzh.ch).

Auswirkungen der Medienqualität auf die Unternehmensreputation (Effects of media quality on company reputation): When media quality as a whole is falling, this influences the reputation dynamics of companies which are communicated by the media. On the one hand, there are increasing risks for companies in terms of scandal-mongering. On the other hand, reputation dynamics become more volatile. There is a strong tendency in lower-quality media to commend key players uncritically, but also to rapidly indulge in scandal-mongering with regard to misdeeds and blunders (see the *study* «Medienqualität und Reputation» («Media quality and reputation»).

Der Fall Carlos in den Medien (The «Carlos» case in the media): There is a far greater occurrence of media hypes characterised by very intensive, uniform reporting in conditions where the media system is structurally weak. These reporting mechanisms in Swiss media are analysed using the «Carlos case» as an example (see the *study* «Der Fall Carlos und die Medien» («The ‹Carlos› case and the media»).

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The mark of the printing and publishing house Schwabe, founded in 1488, dates back to the very beginnings of the art of printing and derives from the circle of artists around Hans Holbein. It is the printer's mark of the Petris, and illustrates Jeremiah 23:29: "Is not my word like as a fire? saith the LORD; and like a hammer that breaketh the rock in pieces?"

Studien Qualität der Medien
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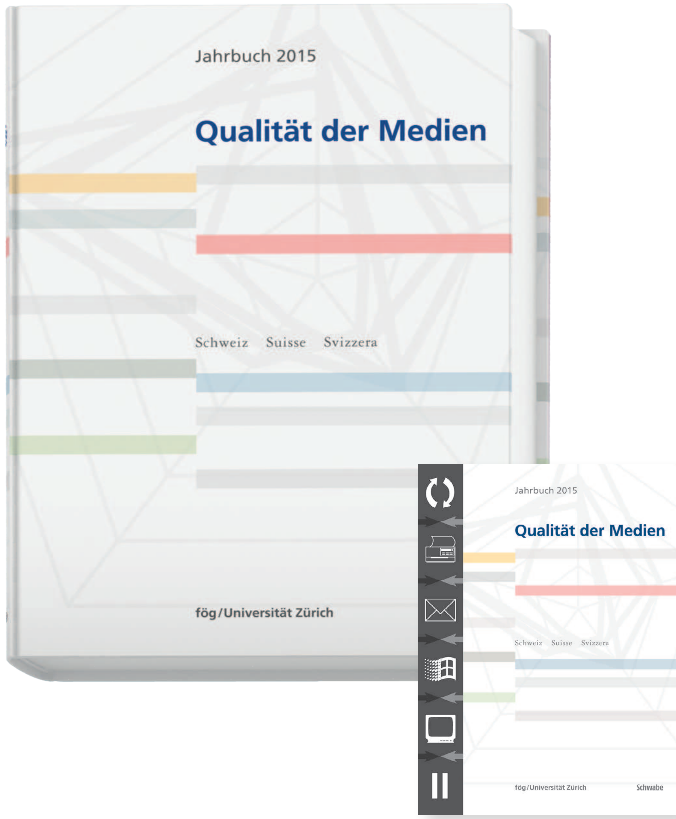

Schweizer Medien unter der Lupe

Bereits zum sechsten Mal erscheint 2015 das *Jahrbuch Qualität der Medien – Schweiz Suisse Svizzera*. Seit der ersten Ausgabe 2010 messen die Herausgeber die Qualität von rund 50 Informationsmedien aus der Deutschschweiz, der Suisse romande und der Svizzera italiana.

Das *Jahrbuch* und die separat publizierten *Studien* und *Reflexionen* bieten mit ihren wissenschaftlich fundierten Analysen eine Grundlage für die kritische Debatte über die Rolle und die Leistung von Informationsmedien in der Schweiz. Dieses Ziel verfolgen die Herausgeber – zu denen auch der im Frühjahr 2015 verstorbene Mediensoziologe Prof. Dr. Kurt Imhof zählte – unvermindert weiter.

Die Digitalisierung und Globalisierung des Mediensystems und die weiter voranschreitende Strukturschwäche der Schweizer Informationsmedien sind die wesentlichen Prozesse, die das sechste *Jahrbuch Qualität der Medien* beschreibt. Dafür werden erneut die Mediennutzung, die ökonomischen Grundlagen der Informationsmedien, die Entwicklung der Besitzverhältnisse und die Medienkonzentration, die medienpolitischen Debatten sowie die Entwicklung der Qualität des Informationsjournalismus in den drei grossen Sprachregionen systematisch untersucht.

Die Digitalisierung fördert nicht nur das Wachstum der Unterhaltungsmedien zulasten eines demokratierelevanten Informationsjournalismus, sondern schwächt die Informationsmedien auch finanziell, indem Werbegelder zu global operierenden Tech-Giganten wie *Google* und *Facebook* abfliessen. Diese Strukturschwäche führt wiederum dazu, dass Medienkonzentration und Konkurrenzwahrnehmung (gegenüber den Tech-Giganten und gegenüber der *SRG SSR*) wachsen und die Medienorganisationen empfänglicher werden für Einflussnahmen ökonomischer und politischer Akteure. Nicht zuletzt aber wirkt sich diese Strukturschwäche der Schweizer Medienorganisationen messbar negativ auf die Qualität der Medieninhalte aus. ■

Für 2015 sind folgende *Studien* geplant:

– *Medienqualität und Reputation*. Analysiert wird, wie die insgesamt sinkende Medienqualität die medienvermittelte Reputationsdynamik der Unternehmen beeinflusst. Gezeigt wird, dass einerseits die Skandalisierungsrisiken zunehmen und andererseits die Reputationsvolatilität zunimmt.
– *Der Fall Carlos und die Medien*. Was passiert, wenn immer häufiger von Boulevardmedien angestossene «Skandale» aus Resonanzgründen auch von qualitativ höherstehenden Informationsmedien aufgegriffen werden?

Das *Jahrbuch Qualität der Medien – Schweiz Suisse Svizzera* wird erarbeitet durch das fög – Forschungsinstitut Öffentlichkeit und Gesellschaft / Universität Zürich (www.foeg.uzh.ch). Es wird gefördert durch die Stiftung *Öffentlichkeit und Gesellschaft* (www.oeffentlichkeit.ch). Sein Ziel ist es, das Qualitätsbewusstsein für die Medien in der Schweiz zu stärken. Das Jahrbuch bietet eine grundlegende Informationsquelle für Medienschaffende, Führungskräfte aus Politik und Wirtschaft, die Wissenschaft und alle Interessierten, die sich mit der Entwicklung traditioneller wie neuer Informationsmedien und deren Inhalten auseinandersetzen wollen.

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